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Training

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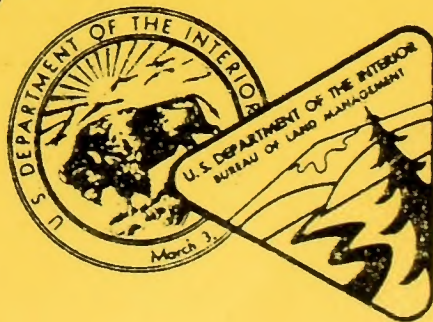


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California's BUREAU PLANNING SYSTEM

QUALITY WORKSHOP
Sacramento, California
October 18-20, 1978

Denver Service Center



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CALIFORNIA

BUREAU PLANNING SYSTEM
QUALITY WORKSHOP

SACRAMENTO, CALIFORNIA
Sierra Inn

October 18-20, 1978

Department of the Interior
Bureau of Land Management
Denver Service Center

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BUREAU PLANNING SYSTEM
QUALITY WORKSHOP

Overview

The Federal Land Policy and Management Act of 1976 (FLPMA) clarifies the role of planning in the Bureau. As a result, regulations are being promulgated and undergoing public review to further outline how BLM will utilize specific planning procedures. More importantly, the intent of the act clearly commits BLM to a system of land and resource management based on land use plans.

Past evaluations have recognized various inequities with respect to the quality of planning documents. A number of reasons have been advanced to explain the wide variations between the quality of planning efforts. These range from lack of training at the specialist level to lack of understanding planning system benefits at various levels of management.

Field Offices have been wide ranging in their attempts to address this problem of planning quality. Some have defined standards and developed quality control procedures while others have yet to implement 1975 manual procedures. To further complicate matters, perceptions of the problem differ among levels of management as well as between field and central (W.O./DSC) offices.

Accordingly, a strategy to identify problems and effect change was developed in March of 1977 (IM 77-171). One of the main points was development of individually-tailored workshops at the State Office level to jointly (S.O./W.O.) develop procedures to improve planning quality. Responsibility for workshop procedures was assigned to the Service Center (D-380) with support from W.O. (220).

Purpose

The individuality of the various states and the resources they must manage is recognized by central office staff. As a result, the workshop method was determined to be most desirable to identify current levels of quality, determine where the states would like to be and define a strategy to "get from here to there". Regardless of where individual problems may be found, management has the ultimate responsibility to rectify them. Accordingly, the workshop target groups were predominantly oriented to various levels of management with the goal to develop an action plan

acceptable to all levels that will result in positive changes to move toward identified goals. Another equally important purpose of the workshop was to improve communication throughout the statewide "Planning Team" and identify areas of accountability that can be further translated to the performance improvement system. In this manner, the action plans do not become "lost" in the course of day-to-day business. Of course, the ultimate goal is to improve the planning system utilization so that on-the-ground management actions can take place in a planned, rational manner. Thus, planning becomes, as the intent of FLPMA, an integral key to effective resource allocation.

The purpose of this report is to summarize the results of the workshop. Also included is an analysis of post-workshop questionnaires that were filled out by each participant.

BUREAU PLANNING SYSTEM

QUALITY WORKSHOP

Specific Performance Objectives:

- . Upon completion of this workshop, planning system key personnel will be able to more effectively manage available resources and personnel through action plan results to result in higher quality planning documents.
- . Through force field analysis techniques, participants will be able to:
 - a. Identify specific changes that can be made immediately.
 - b. Identify specific changes to be made in future efforts and start planning to make them.
 - c. Identify specific changes that are desirable but require support from outside organizations (i.e., District staffs, State Office, DSC, Washington Office, etc.).
- . As directed by the State Director, participant work groups will develop specific action plans for identified high priority changes.
- . Work groups will orient action plans to the areas of:
 - a. Technical Quality
 - b. Useability (effectiveness of documents)
 - c. Bureau Planning System Management
- . Given small group problem solving methods, participants will be able to increase communication effectiveness about work objectives and among work groups.
- . Upon presentation of work group action plans, the State Director will be able to give direction for decisions about the next steps that should be taken to follow up this workshop (e.g., progress reports, task group follow-up sessions, implementation decisions, specific staff assignments, etc.).

- . Supervisors will be able to translate action plans to individual employee PIPRs to assure accountability and follow-through of proposed changes.
- . Service Center personnel and Washington Office representatives will have input into sessions and will be available for resource consultants. At the workshop conclusion, they will summarize results and issue follow-up reports to participants.

ROSTER OF ATTENDEES

California State Office

Ed Hastey, State Director
Jim Ruch, Associate State Director
Robert Metzger, Chief, Planning Coordination Staff
Robert Barney, Planning Coordinator
John Birch, Chief, Division of Resources
Neil Pfulb, Director, Desert Planning Staff
Martin Prisco, D.P.S., Regional Planner
Gerald Everts, Chief Engineer
Rich Learned, Program Analyst
Buz Kennedy, Chief, Branch of Biological Resources
Kris Hayes, Management Services

Bakersfield District

Lou Boll, District Manager
Ed Lynch, Area Manager

Folsom District

Alan Thomson, District Manager
Steve Howard, Area Manager
Roy Pearl, Planning and Environmental Coordinator

Redding District

Stan Butzer, District Manager
Terry Woosley, Area Manager

Riverside District

Gerald Hillier, District Manager
Tom Rodda, Planning and Environmental Coordinator
Dave Mari, Area Manager

Susanville District

Rex Cleary, District Manager
Marc Duncan, Planning and Environmental Coordinator
Mark Morse, Area Manager

Ukiah District

Dean Stepanek, District Manager
Joel Verner, Planning and Environmental Coordinator
Bill Rus, Area Manager

Denver Service Center

Dick Barbar, D-380
Jeff Bellows, D-630

Washington Office

Gordon Knight, W.O. 220

Alaska State Office

Gary Seitz, Planning Coordinator

Oregon State Office

Phil Hamilton, Chief, Planning and Environmental Coordination

Battle Mountain District Office, Nevada

Gene Nodine, District Manager

CALIFORNIA
BPS QUALITY WORKSHOP
AGENDA

First Day - Wednesday, 10/18/78

(Morning)

8:00 - 8:30	Introduction	State Director
	Workshop Goals	D-380
	BPS Management Technical Documents Useability	
8:30 - 9:45	MFP Progress Analysis	Panel
10:00 - 10:15	Workshop Design & Concepts	D-630
10:15 - 11:30	Organization Exercise	Teams
11:30 - 12:30	Lunch	
12:30 - 1:00	Report to Group	Team Representative
1:00 - 4:30	Force Field Analysis	Teams
	Concepts Analysis Prioritizing	
	Prepare Statements of Objectives	Teams
4:30	Adjourn	

Second Day - Thursday, 10/19/78

8:00 - 9:30	Force Field - Report to Group & State Director	Team Representative
9:30 - 11:30	Synthesis & Decision on State Priorities	Team Representative

Second Day (Cont'd.)

11:30 - 12:30	Lunch	
12:30 - 1:00	State Director Responds & Assigns Action Teams	State Director & Assoc. State Director
1:00 - 4:30	Interim Action Planning	Teams

Third Day - Friday, 10/20/78

8:00 - 9:15	Interim Action Planning - Report Back	Teams
9:15 - 11:15	Finalize Action Plan	Teams
	Break	
11:30 - 2:30	Final Action Plan - Report Back	Team Representatives
2:30	Summarize - Closeout	State Director

10/1/2017

To: [Faint text]

From: [Faint text]

Subject: [Faint text]

[Faint text]

[Faint text]

[Faint text]

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PRE-WORKSHOP QUESTIONNAIRE

[Faint text]

[Faint text]

Memorandum

To: Participants, Bureau Planning System Quality
Workshop

From: State Director, California

Subject: Request for Individual Responses on Bureau Planning
System in California

Please complete the attached questionnaire - your views will assist
in the workshop by:

1. Providing information for a panel discussion consisting
of the Associate State Director, a District Manager
and an Area Manager.
2. Providing information to all participants relative to
BPS management issues.

Review the workshop pre-work package. This will provide a common
base of additional data and perhaps, stimulate your comments and
feelings.

Your questionnaire should be returned to Bob Metzger, Chief, Planning
& Environmental Coordination.

Enclosure

DISCUSSION QUESTIONS

During the course of the workshop, participants will be divided into workgroups. Each workgroup will consider at least these three basic questions and prepare reports as directed.

Please provide us with your present feelings and comments.

A. MANAGEMENT OF THE INVENTORY/BPS/ES SEQUENCE:

- what is the existing management of the Bureau Planning System in your state?
- what measures have been instituted to insure proper interface and data flow between inventory and planning - planning and environmental statements?
- what basic guidance does your state need to develop or emphasize for quality control and review?
- how is your state or office organized for BPS management? Are changes needed?

(Consider: - Different staffing levels
 - Diversity of staff expertise
 - New organizational arrangements)

What do you believe is the real priority for the Bureau Planning System in relation to the other work of the State?

Comments:

(use back of page)

B. TECHNICAL ADEQUACY OF BPS DOCUMENTS:

- are the existing documents adequate?
- if not, why and what can be done to improve?
- what specific technical quality standards are needed?
- is training needed? Technical assistance? Other?
- what are the problems in reaching technical quality?

Comments:

(use back of page)

C. USEABILITY (effectiveness) OF BPS DOCUMENTS:

- how should the MFP really be used as a tool for management?
- are they now being used for decisions? How Much? What type of decisions?
- if now why? What are the hindering reasons?

Comments:

THE 1990S: A TIME OF CHANGE

The 1990s are the 10 years in American history when the most dramatic changes in the way we live and work have taken place. A new era of change is under way, and it is important to understand the changes that are under way in order to survive and thrive.

The 1990s are the 10 years in American history when the most dramatic changes in the way we live and work have taken place.

1990 - 1999
1990 - 1999
1990 - 1999
1990 - 1999

The 1990s are the 10 years in American history when the most dramatic changes in the way we live and work have taken place.

1990 - 1999

1990 - 1999

1990 - 1999

PANEL DISCUSSION

1. Changing the way we live and work

1990 - 1999

1990 - 1999

1990 - 1999

1990 - 1999

2. Changing the way we live and work

1990 - 1999

1990 - 1999

1990 - 1999

3. Changing the way we live and work

1990 - 1999

1990 - 1999

1990 - 1999

1990 - 1999

1990 - 1999

BUREAU PLANNING SYSTEM ISSUES IN CALIFORNIA

Preliminary to the BPS Quality Workshop, a questionnaire was distributed to each participant for his individual response. A panel was formed to review the responses to the questionnaire and discuss the issues perceived by the workshop participants.

The panel consisted of:

Jim Ruch - State Office
Bob Metzger - SO - PECS
Dean Stepanek - DM, Ukiah
Ed Lynch - AM, Bakersfield

The following issues were identified in the panel discussion:

BPS Quality Workshop

(Summary of Comments from BPS Workshop Questionnaire)

A. Management of the inventory/BPS/ ES sequence

1. Existing Management of Bureau Planning System

- PECS manages system, State Office, Division of Resources involved on hit or miss basis
- There is no management of the system
- Direction comes from State Office District impliment
- Management decentralized with responsibility in the Districts

2. Measures for interface between inventory/planning - planning/ES

- PMCS but little use yet of preplan analysis
- very little left to districts to answer
- none

3. Basic Guidance needed for quality control and review

- a structured sign-off system for approval of all MFP's
- PECS reviews
- need for state to place more emphasizing on the system
- Area Managers and staff need more involvement
- very little, more than whats in on POG's

4. Organization for BPS management

- need separate planning coordinator in each district
- can be no organization without adequate funding
- no charge needed
- need separate planning staff

5. Real Priority of BPS in relation to other work.

- Top priority must be maintained, it guides other work
- Takes a back seat to day to day demands
- possibly second behind ES/EAR
- no priority, comes in second or last

B. Technical Adequacy of BPS Documents.

1. Are existing documents adequate?

- no, not fully, still too much motherhood
- no (most responses)

2. Needs to improve BPS documents

- major updates
- increase effective data flow from inventory through ES.
- need strong basic inventories
- more understanding of participants and documentation of decisions
- start with good preplan analysis and follow it
- need more specific land use allocations. less motherhood

3. What quality standards are needed?

- very few, performance standards are a better measure
- existing standards adequate but not adhered to

4. Is Training needed? Technical Assistance?

- yes. (most responses)
- yes and more wm for special planning team
- no, but need manpower to do planning

5. What are problems in reaching Technical adequacy?

- Time and money
- Lack of understanding of end goal
- Lack of manpower to gather data base and continue ongoing programs.
- Standards seem to be forever changing

C. Useability of BPS Documents

1. How should MFP really be used?

- serve as management objective and identify what an area is to be managed for
- rational end backup for management decision
- Decision making tool for A.M.
- To assure consistent decision making

2. Are they now used?

- yes, but could be better used if more specific
- some, but have difficulty with generalization
- no, not specific enough

3. Hindering reasons for non-use.

- not enough detail to address current problems and issues.
- too much motherhood
- existing documents inadequate, lack of rational-documentation

D. Public Participation

1. Are present efforts adequate?

- yes
- yes but still needs more front end involvement in inventory URA stages
- need to try harder to get polarized groups together to resolve conflicts
- yes, but too much reliance on the public meeting

Panel Comments

Jim Ruch:

- Panel will indicate "personal" response to questionnaire

Ed Lynch:

- Planning system works
- U.R.A provides sufficient information for starting to develop A.W.P.
- MFP spells out specific inventory needs

Dean Stepanek: (We should be managing the system, but the system is managing us!)

- Planning system should aid in decision-making
- Greatest frustration - situations develop which require starting with new MFP
- BPS - should make the risk in decision-making manageable!
- How well do D.M.'s (A.M.'s) lay out work related to planning decisions - what level URA - MFP

Bob Metzger:

- State has been making progress with the planning system
- Mid 70's plans completed as the "State of the Art"--Later learned plans were 35% Motherhood.
- Quote - House Clerk "planning takes money away from the real mission!"
- Time is running against us
- We know what we need to make good plans
- Time pressures causes steps to be out
- Dessert plans - 70% of State
1st generation effort in the area
- What data is needed and can be used within the time available
- Data inadequate to do the job?
- Rather - there is hard decision-making
- California desert: "we have enough data to inundate us and enough time to drown in it."

Jim Ruch:

- The feeling is shared (in Washington) that the plan may be managing us!
- Is the planning system about to be changed?
- Workshop can generate suggestions, etc., to make changes in the planning system for the coming years.
- Function of planning - to reduce risk of decision-making, not eliminate it!
- Workshop goal - design something that will help us make plans

Discussion

Jerry Hillier:

- Bunching activity plans and still updating MFP on the same piece of ground.

Rich Learned:

- Let's identify the "critical" issues we know are going to be part of the plan -- let's use the PPA!! This is where management identifies critical issues

Gordon Knight:

- Panel has identified issues important to management
- Main focus - how to use the planning tool with the information we have now
- The role of new regulations on planning system
- Regulations - close to Forest Service
- Make it understandable to users
- We do not intend to throw out the BPS - they are changes according to legislation
- Changes are incremental; in terms of legislation, time pressure, publics, etc.
- People on outside want to see "how we made decisions."

Rex Cleary:

- Level of decisions in planning
- Lack of keeping documents current
- Lack of usability
- Striving to make decisions on specifics - trying to make ultra-specific decisions without basis in information

Rex Cleary:

- Data stacked up - but not woven into plan - usability of plans

Martin:

- Managers, manage the plan

Jim:

- Expressing desire for change - not fear of change
- Planning system depends on people on the ground doing the job

Ed:

- If we use our planning document we can make adjustments on specific plans

Jim:

- Can DM use MFP on specific issues?

Mark:

- We can when it goes the way we want it to!

Jim:

- Do you need a full update?

Mark M.:

- Not full update - but I need more than I'm getting now!
- How many forester's affected?
- One - our forester?

Jerry H.:

- Frustration - going back and redoing MFP

Jim:

- Are we going back and collecting more data when we really don't need it?

Stan B.:

- Old plans and procedures don't apply to requirements of current standards for MFP

Jerry H. (1975):

- Priorities established without data! Today's standards require different levels of inventory

BPS WORKSHOP - WORK GROUPS

Group A

Rex Cleary
Gerry Hillier
Terry Woosley
Ed Lynch
Bob Metzger
Jerry Everts

Group B

Lou Boll
Buz Kennedy
Jerry Harrell
Steve Howard
Joel Verner
Martin Prisco

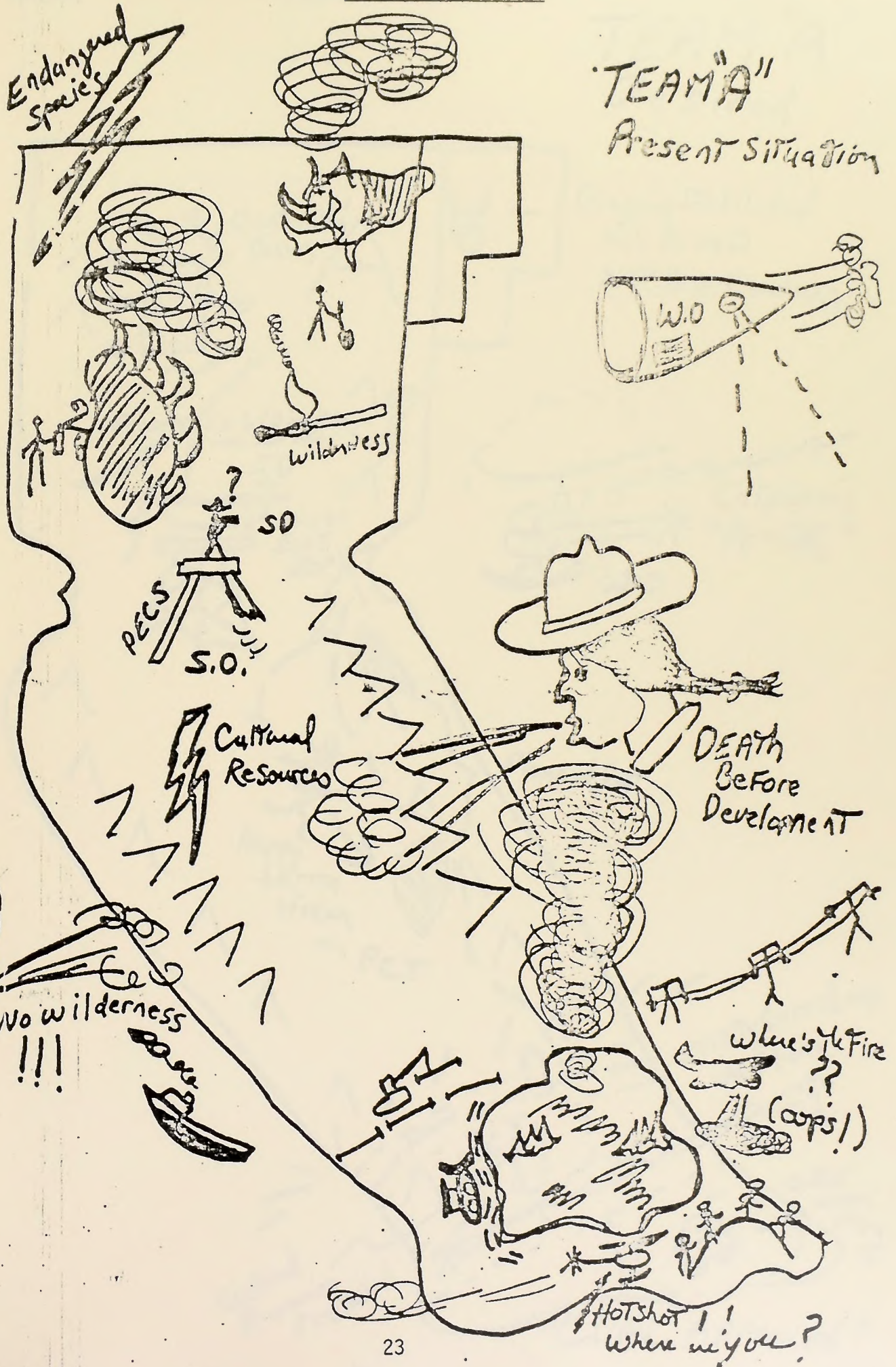
Group C

Dean Stepanek
Al Thomson
Dick Knight
Dave Mari
Mark Morse
Bob Barney
Tom Rodda

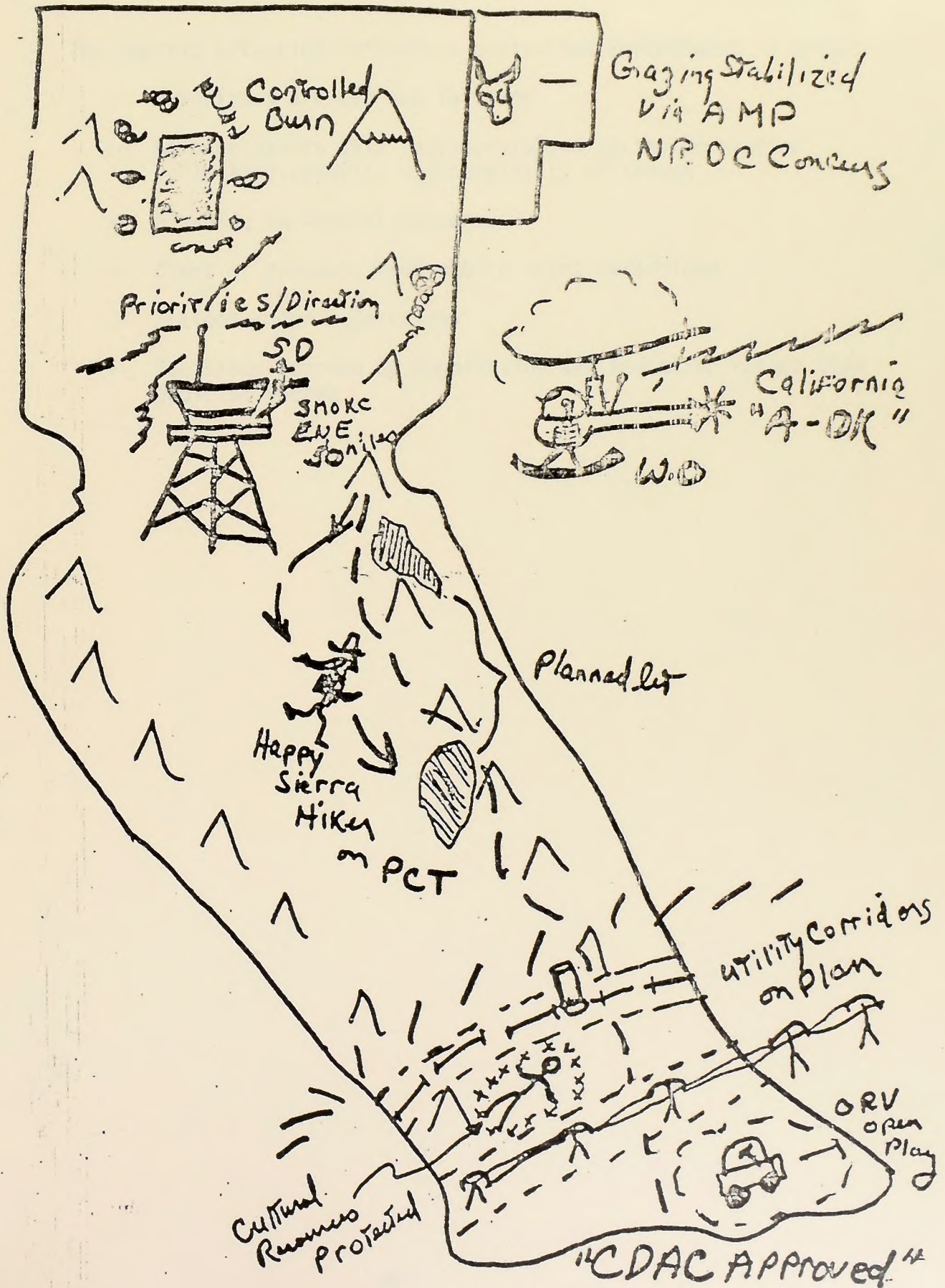
Group D

Stan Butzer
John Birch
Neil Pfulb
Rich Learned
Bill Rus
Roy Pearl

ORGANIZATIONAL EXERCISE: FINDINGS



TEAM "A"
Desired



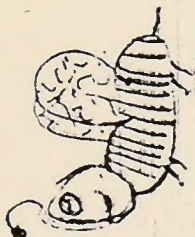
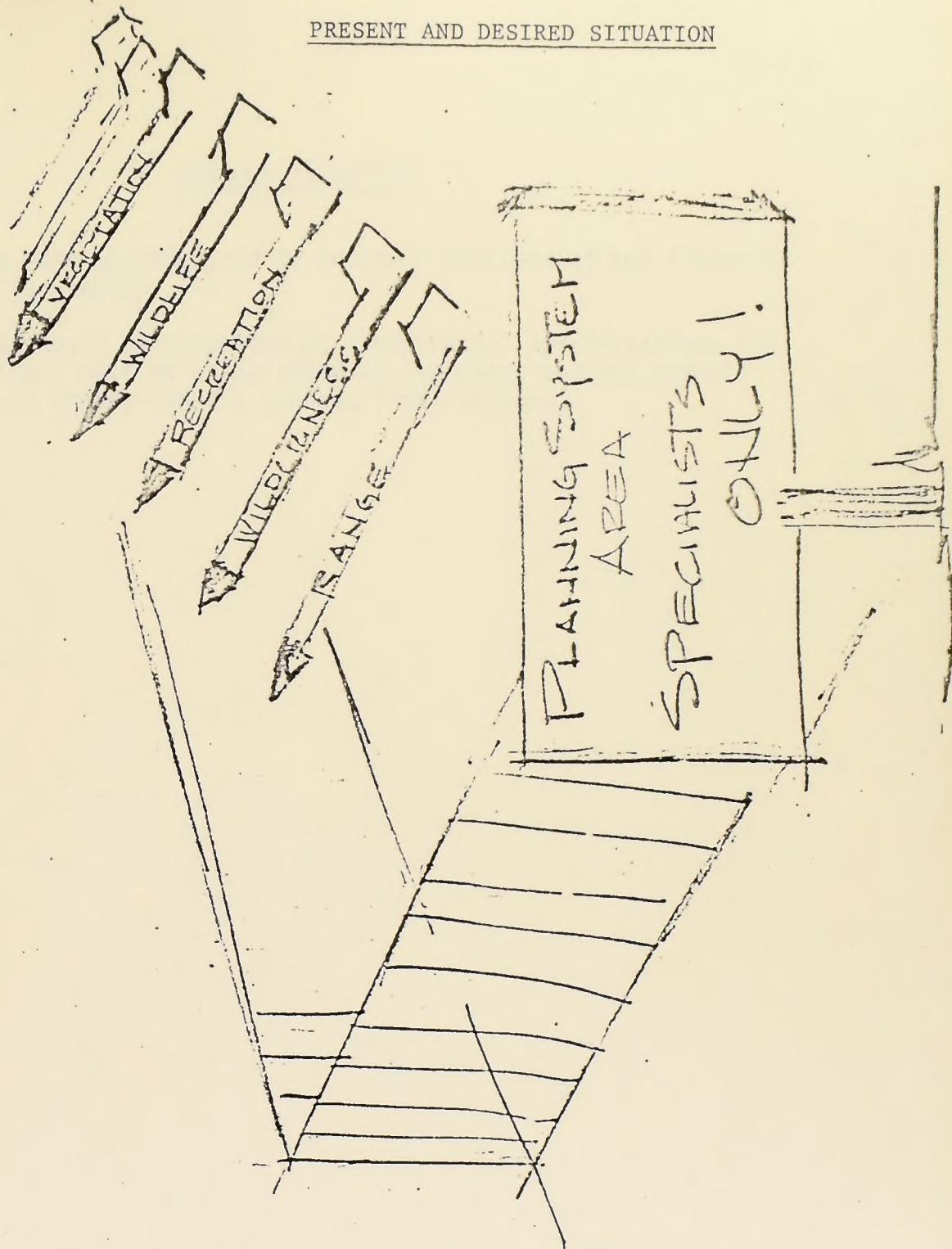
DESIRED SITUATION

The desired situation reflects a controlled environment in which:

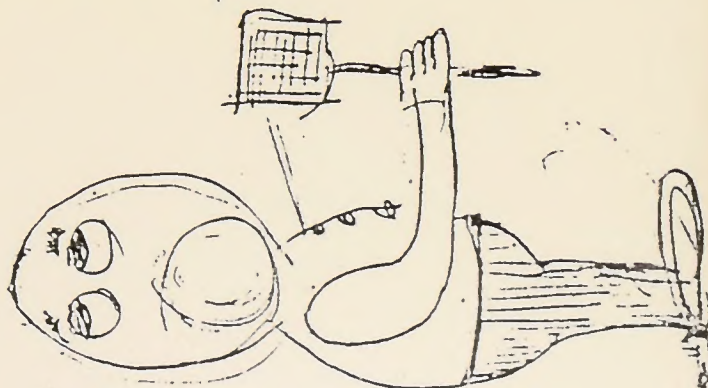
- Priorities are set and followed
- Balance exists with inventory/planning/implementation reflecting severity and complexity of issues
- Planning in logical sequence
- Blend of products from public lands determined
- Actions occur - decisions
- Decisions reached by negotiation and mediation rather than judicial decree

Group "B"

Present Situation
& Desired Situation



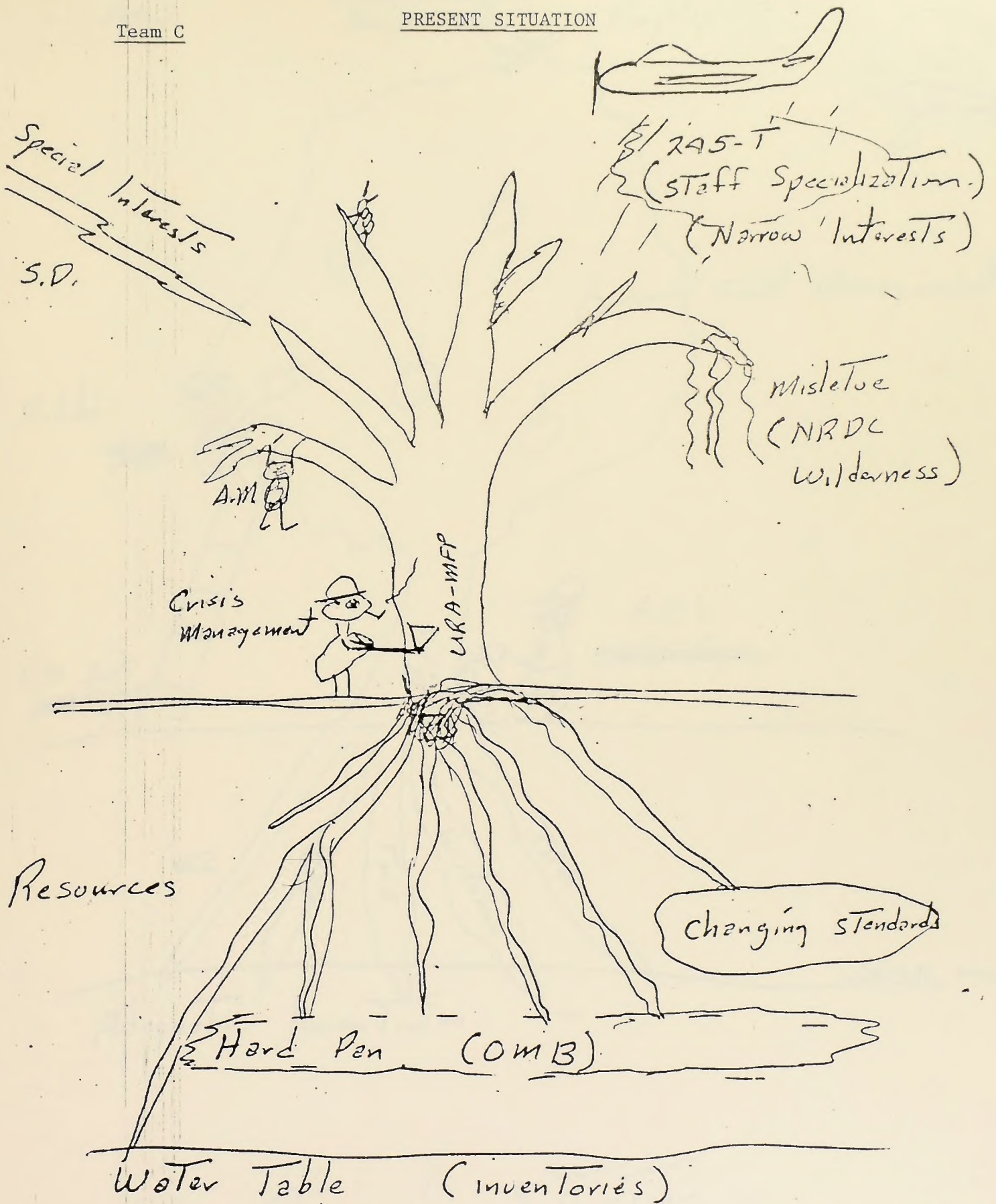
...BUT, ALL I
REALLY WANTED
WAS ONE OF
THESE!



DESIRED SITUATION

Planning must be organized to insure understanding and agreement of what is wanted.

Planning should be perceived as a contract. Specifications for the contract must be established at the start and the effort managed to accomplish the needed, final product.



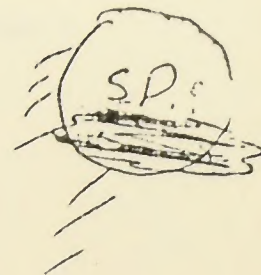
Before

Present Situation TEAM C(3)

ship



Employees



Public



Q.M.



B.P.S.



A.M.'s

~~Staff~~ ~~Spec.~~

Good Management

etc.

MRT

3+1

Wilderness

CRM

Adequate Inventories.

WATER TABLE

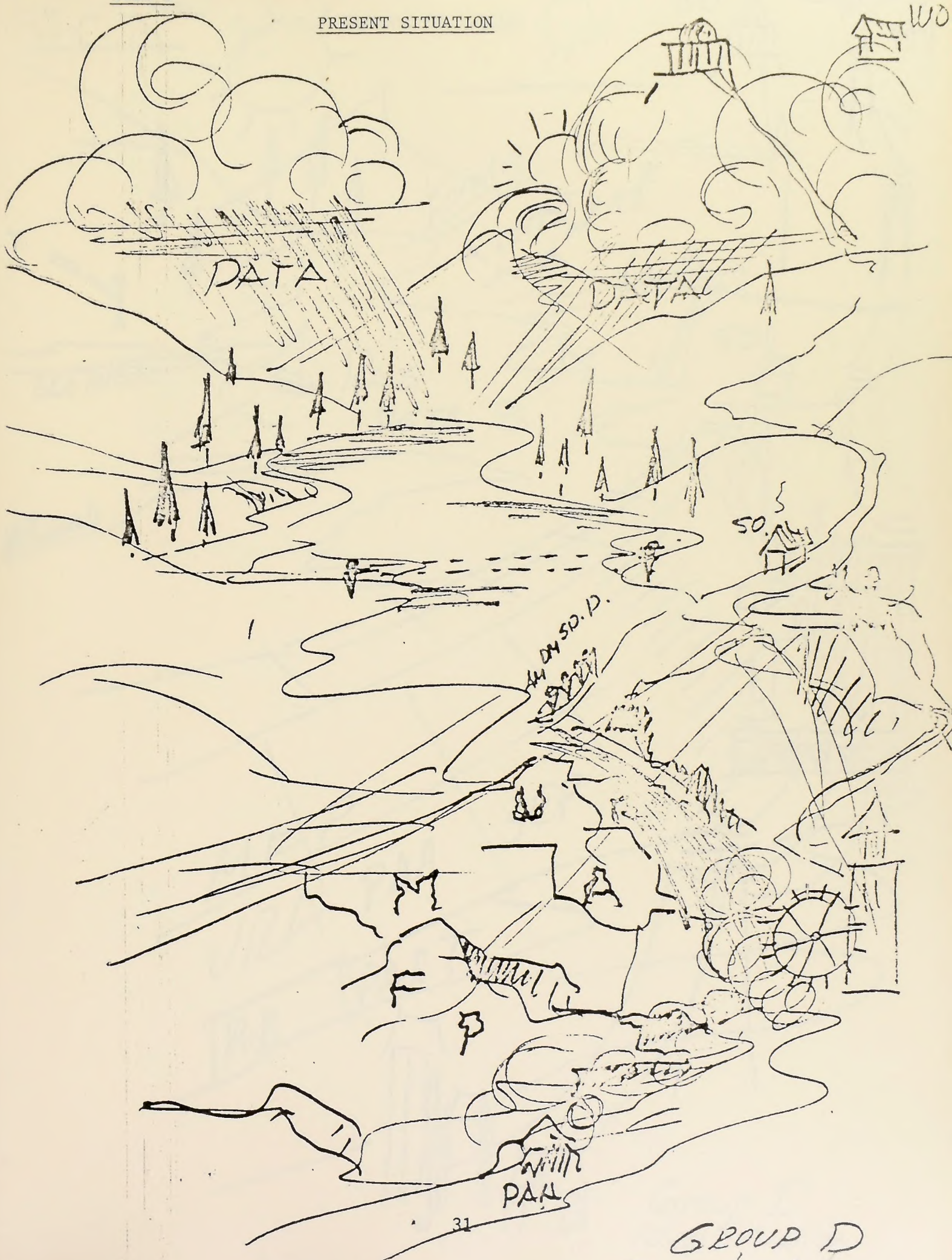
— Desired Situation —
Team C (3)

DESIRED SITUATION

A planning system that "feeds the roots" of decision making.

Cooperative efforts of staff specialists, management and policy allowing the public to reap the benefits of good management.

PRESENT SITUATION

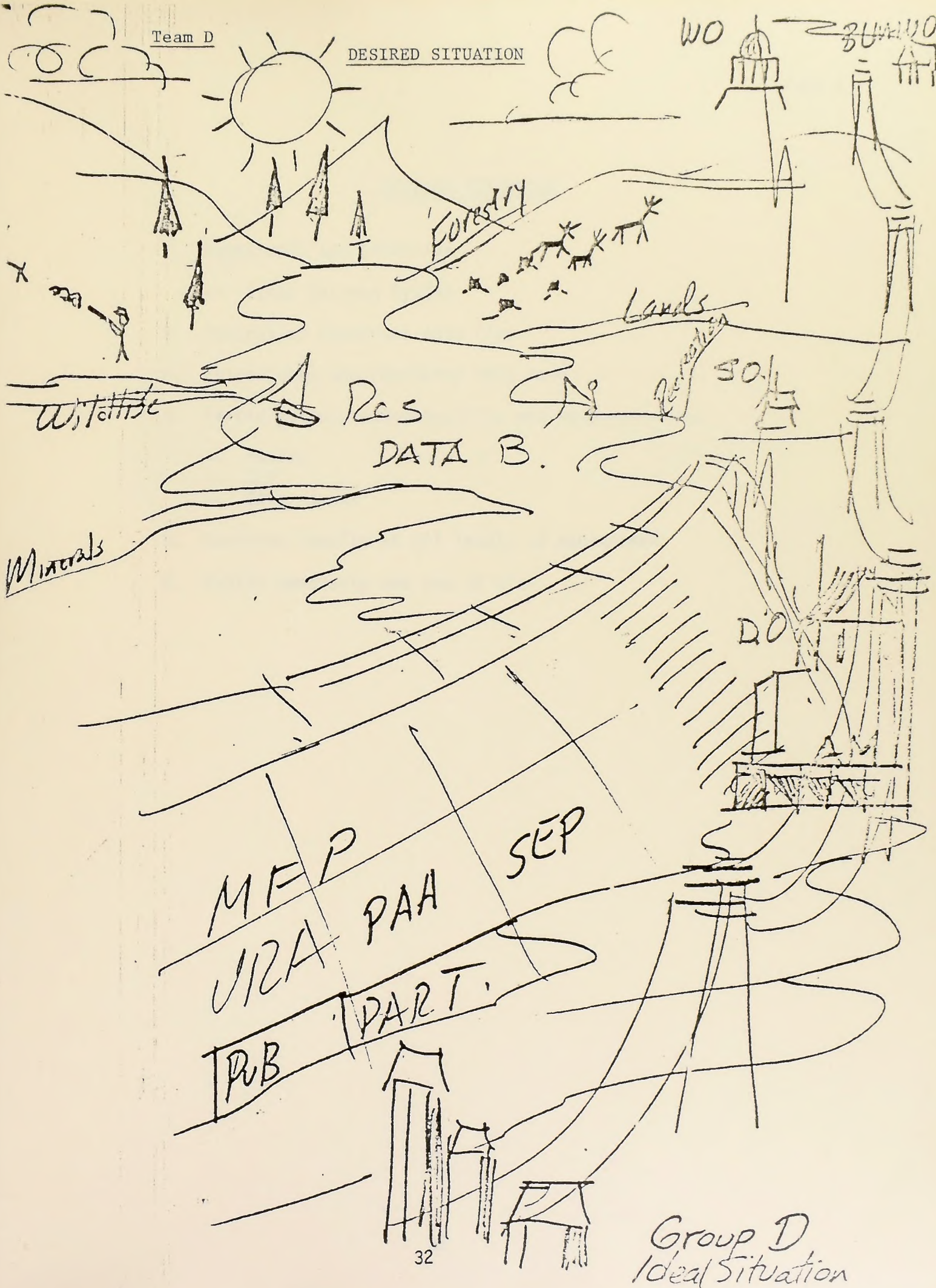


Team D

DESIRED SITUATION

WO

30/11/20



Group D
Ideal Situation

DESIRED SITUATION

1. Functional and Effective
 - Issue Related System
2. Controlled resources data flow
3. Established and regulated data base
4. Participation, accountability and responsiveness
 - Public
 - BLM
 - Governments
5. Positive results at all levels of management
6. Public ownership and use of plan

FORCE FIELD ANALYSIS

The following section presents the findings of the force field work teams. Findings are organized by first reporting a summary of the priority forces and accompanying objective statements. Complete listings of all helping and hindering forces identified by force field teams, together with each teams' collective perceptions on "force importance" and "force readiness-for-change" are also reported.

FORCE FIELD

IMPORTANCE	READINESS	FORCE NO.	HELPING FORCES	PRIORITY
		35	Conflict resolution by negotiation/mediation	
		36	Top management support	
		37	Clearly defined	
		38	BLM employees desire for good performance	
		39	Pride in past accomplishments	
		40	Planning process very sound	
		41	Generally positive public participation	
		42	Once decision is made we have internal support	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
H	L	1.	Constant change in the manuals (1, 13, 18)	
H	M	2.	Inventories beyond needs	
H	M	3.	Plans take too long to complete	
H	L	4.	No implementation of decisions	
M	M	5.	No standardized system to take care of the many changes	
M	L	6.	Pressure for decisions that are outside the planning system	
L	M	7.	Decision makers usually core from single discipline	
H	M	8.	District staffs not organized to do planning	
		9.	S.O. relies entirely on Districts to do planning	
		10.	Accountability for BPS is not clear in D.O.	
		11.	D.O. Planning-Environmental Coordination role not clear.	
		12.	Constant changes with new legislation	
H	M	13.	Planning system interpreted to require uniform coverage	
H	L	14.	Legal; administrative; judicial mandates conflict	
M	H	15.	D.O. staff not equipped to keep up or updates & minutes	
H	L	16.	Activity plan details demanded in MFP decisions (eg. precise forage allocations for grazing ES's)	
H	L	17.	Planning system not dynamic enough (not kept current & utilization).	
H	H	18.	Ineffective implementation of <u>Preplanning Analysis</u> by management (&/or unclear to ending of it).....	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
M	L	19	Poor public involvement	
H	M	20	Growing public polarization	
H	L	21	Judicial degrees - (management by court order)	
H	L	22	Budget priority (doesn't consider bureau priorities and may be not even congressional ones.)	
M	M	23	Public opinion will override professional judgement.	
H	H	24	Lack of understanding of good planning	
H	H	25	Planning training is weak in D.O. & S.O. (who to train is one problem)	
H	M	26	S.O. resources is completely divorced from planning	
M	H	27	Planning system does not get the support input needed (see 31)	
H	L	28	Blinders approach raises staff expectations (w/34)	
H	L	29	Expanding BLM causes constant player changes.	
M	M	30	Lack in confidence in others results in desire for more planning	
M	H	31	S.O. Tech Services not involved in BPS (see 27)	
H	M	32	Plan ownership not clear for desert	
H	L	33	Increase of resources we have to deal with is adding complexity	
H	M	34	The planning system does not generate innovative recommendations.	
H	L	42	Multiple use wildland management is a (goddam) very complex problem	

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
I		<p><u>Force:</u> Lack of effective application and understanding of the pre-planning analysis by management. This results in inventories beyond needs and planning efforts all carried out at the same level at detail.</p> <p><u>Objective Statement:</u> Managers need to be trained in effective pre-planning to set objectives of MFP and to direct the planning effort. This training needs to be done before any manager begins pre-planning and could best be accomplished through a state workshop. First workshop should be early FY-79.</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
II		<p><u>Force:</u></p> <p>Development of the MFP frequently does not generate inovative recommen- dations and/or decisions to resolve complex problems or conflicts,, this is in part because of the blinders approach to step IV of the URA by the resource specialists.</p> <p><u>Objective Statement:</u></p> <p>PECS staff will work with the S.D. to convince the Washington Office of the need to modify the "Blinders Approach" in URA step IV to enable the specialist to consider limitations to resource development based on legislation, conflicting regulations, compelling needs of other re- sources &/or resource users that have <u>obvious</u> conflicts with possible maximization of single resource uses the analysis is to be forwarded to Washington by April of 1979.</p>				

40

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
II		<p><u>Force:</u></p> <p>There is a lack of understanding of good planning and planning training is weak at both the District and State offices with some difficulty identifying the target personnel that need training in planning.</p> <p><u>Objective Statement:</u></p> <p>PECS will take the lead in developing a California statewide planning system training program, ready for full implementation by beginning of FY 1980, this will equip all employees with direct inputs in URA, MFP, and PAA formulation with a comprehensive understanding of BPS and its objectives with special emphasis in preplanning analysis and the gearing of planning and inventory efforts to mesh with significant issues task force will be formed with PECS; Div. of Resources: and Technical Services Division; and representative Districts leadership by March 1979 California E & P workshop. Curriculum, including target group will be completed by July 1, 1979.</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
IV		<p><u>Force:</u></p> <p>Completed plans are often not utilized, nor kept current and District staff is neither equipped nor organized for maintenance.</p> <p><u>Objective Statement:</u></p> <p>To establish a system and priority for plan maintenance and assure its inclusion in program packages, AWP, staffing and organization. To review process and system to determine how much of the problem is attitudinal, how much is conflicting priority, and how much is system weakness.</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
V		Pressure for decisions that precede the planning system				
VI		Accountability, organization and role definition are inadequate for BPS at District level.				
VII		Activity Plan details demanded in MFP decisions				
VIII		CSO Res. Division is not involved in planning process				

IMPORTANCE	READINESS	FORCE NO.	HELPING FORCES	PRIORITY
H	H	1	Pre-planning analysis if done/used correctly	
H	H	2	Having a systematic process	
H	L	3	Current legislation	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
H	H	1	Commitment to planning by staff and by mgt.	
H	L	2	Lack of accountability	
H	H	3	Understanding of goals and purposes of planning by staff and mgt.	
L	L	4	Excessive detail	
L	H	5	Communication	
L	H	6	BPS promotes personal conflicts rather than coop.	
H	L	7	Lack of consistent direction	
H	L	8	Lack of "I can" attitude	
M	H	9	Lack of "Cooperative" attitude	
H	H	10	Not clear definition of roles	
M	M	11	Lack of team work	
H	L	12	Inadequate planning organization at the Dist. level	
H	M	13	State priority setting & consistency	
M	M	14	Step I - MFP (Advocacy attitudes)	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
H	L	15	Manager should not have a specialist attitude in decision stages	
M	M	16	Lack of control of planning process by mgrs.	
H	H	17	Lack of PPA	
L	H	18	BPS doesn't have budget constraints	
M	H	19	BLM review process is after-the-fact	

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
I		<p><u>Force:</u></p> <p>Lack of understanding of goals, benefits and purposes of planning.</p> <p><u>Objective Statement:</u></p> <p>Conduct training session to achieve an understanding among resource specialists and managers, of the goals, purposes, and benefits of planning with respect to BLM lands. This session should also discuss the means of achieving the benefits of planning <u>especially</u> utilizing the pre-plan analysis procedure. This should be accomplished by Jan. 1, 1980.</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
II		<p><u>Force:</u></p> <p>Lack of commitment to & accountability for planning by staff & management</p> <p><u>Objective Statement:</u></p> <p>Provide specific accountability through PIPR elements of responsible staff & Mgt. to planning - training accomplishments & quality in FY 79 & outyears. Also insure that direction established is understood & consistent throughout staff & Mgt. allocation of budget must reflect accomplishment & quality expected</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
III		<p><u>Force:</u></p> <p>No clear definition of role of participants in planning process - DM/AM/PC/Specs - There is also a lack of adequate organization for planning & absence of team work</p> <p><u>Objective Statement:</u></p> <p>a) Develop specific planning element in each job description so each knows what is expected. b) Develop planning staff or authority to ad hoc team under leadership of P.C. c) Hire planners on P.C. or train d) Assign total job to planning</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
IV		<u>Force:</u> Constantly changing priorities & crisis management <u>Objective Statement:</u> Establish priorities consistent with needs of the field & designate the necessary individuals to be responsible for completion with appropriate authority by means of PIPR in FY 79				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
V		<u>Force:</u> "I can do" attitude is lacking				
VI		<u>Force:</u> Manager bias in decision stages. Managers have a specialist attitude when making decisions.				
VII		<u>Force:</u> Planning review process is after the fact				

IMPORTANCE	READINESS	FORCE NO.	HELPING FORCES		PRIORITY
H	-	7	Strong SD/ASD support		
H	-	8	Dedicated personnel		
L	H	9	Pre-planning analysis		
M	L	11	Public support		
L	-	12	FLPMA		
L	H	15	S.O. Manual 1608 MFP -AWP bridge		
	H	17	Planning system review process		
M	M	18	Flexibility to organize planning effort around staff		
H	-	19	A real approach to MFP		

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
M	L	1	Public mistrust	
L	L	2	Lack of personnel	
M	M	3	Personnel turnover	
M	H	4	Lack of internal district management direction	
H	H	5	Too many #1 S.O. priorities	
L	M	6	Lack of relevant S.O. resources guidance to planning efforts	
H	M	10	Tunnel visioned inventory standards	
H	L	13	Delays in FLPMA guidance	
H	L	14	Lack of coordination among single-use driver MFP/ES schedules	
M	L	16	ES review process & underlying mistrust	
M	M	20	AWP approval lag	
H	H	21	Tunnel visioned specialists exerting control over decisions	

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
I		<u>Force:</u> Too many #1 S.O. priorities.				
		<u>Objective Statement:</u> S.D. assign responsibility to PEC staff to coordinate AWP advises to assure that planning priorities are balanced with activity directed work.				

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:	Includes	Synthesis
		<div> <div><u>Action Word</u></div> <div>"Do This"</div> </div> <div> <div><u>Key Result Desired</u></div> <div>"To Get This"</div> </div> <div> <div><u>Target Date</u></div> <div>"By This Time"</div> </div>		
II		<p><u>Force:</u></p> <p>#2 Lack of internal District management direction.</p> <p><u>Objective Statement:</u></p> <p>By October 30 every year, the District Manager will layout the direction, time frame, and goals for <u>all</u> District Priorities and key accomplishments in an understandable manner to eliminate false starts and wasted effort (let us know where you want to go with the programs and we will accomplish them).</p>		

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:	Includes	Synthesis
		<div> <div><u>Action Word</u></div> <div>"Do This"</div> </div> <div> <div><u>Key Result Desired</u></div> <div>"To Get This"</div> </div> <div> <div><u>Target Date</u></div> <div>"By This Time"</div> </div>		
III		<p><u>Force:</u></p> <p>Priority #3- Tunnel vision inventory standards. The force field analysis identified tunnel vision inventory standards as a hindering force with a H (strong) impact with a medium readiness for change in a reasonable amount of time. A possible example is YRM</p> <p><u>Objective Statement:</u></p> <p>During the next fiscal year the entire Bureau inventory process should be studied by an inter disciplinary group to determine whether present inventoru standards are too intensive, time consuming and costly for the results that are received. If the inventory study is too time consuming, concentrate on VRM.</p>		

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis	
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"			
IV		<u>Force:</u> The pre-planning analysis is a very useful tool for identifying critical management issues which need to be focused on and resolved in the BPS. It is presently used very little in the state, but has a high potential for positive change. <u>Objective Statement:</u> District Managers will prepare pre-planning analyses for all MFP new starts on updates by July 1 prior to the fiscal year when inventories are to be initiated.					

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IMPORTANCE	READINESS	FORCE NO.	HELPING FORCES	PRIORITY
H		1.	We have a planning system	
H		2.	We have identified a need for change	
M		3.	Land use decisions made on Aereal basis	
H		4.	High quality of employees	
M		5.	Limited budget encourages innovative thinking	
L.		6.	Planning has high priority.	
H		7.	Management committment to planning	
M		8.	Eliminates some risk in decision making, makes DM & AM jobs easier.	
H		9.	Tracking system to relate planning decisions into AWP	
H		10.	FLPMA - recognition of system by law.	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
H	L	1.	Constant change in policies, procedures	
M	L	2.	Limited budgets	
M	L	3.	Lack of budget flexibility	
ML	M	4.	Wrong people in wrong jobs	
H	M	5.	Different perceptions of what BPS is to accomplish	
H	ML	6.	Perceived as "paperwork" process	
M	H	7.	Duplication of efforts i.e. URA step 243, SEP, PAA	
M	H	8.	Some planning data (i.e. SEP) not useful-just data with little analysis.	
H	H	9.	Mgmt. does not make clear statement of issues up front.	
M	H	10.	Concern over planning regulations - what are their impact	
H	H	11.	Planning to satisfy system, not needs.	
H	L	12.	Fear of making "wrong" decision	
H	H	13.	Top Mgmt. has turned decision making for setting standards over to specialists, and cost/benefit analysis has not been done	
L	H	14.	Functional evaluations tend to concentrate on components of the system rather than results or useability.	
H	H	15.	Lack of system to measure results	
H	H	16.	Lack of specific land use allocations.	
H	L	17.	Lack of flexibility in relating BPS realistically to District needs.	
H	L	18.	Inflated expectations, unrealistic	
M	L	19.	Lack of public confidence in system	
H	H	20.	Lack of updates	

IMPORTANCE	READINESS	FORCE NO.	HINDERING FORCES	PRIORITY
M	M	21.	Lack of "in-house" confidence in system.	
L	L	22.	Don't get total public opinion	
H	M	23.	Expectations of public input not met.	
M	L	24.	Court driving Mgmt. in certain directions-we are doing reactive Mgmt.	
H	M	25.	System not designed for reactive Mgmt.	

Summary

Priority Forces and Objective Statements

Priority	Force No	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
1		<u>Force:</u> Management does not define and prioritive key issues and problem areas prior to starting planning. <u>Objective Statement:</u> Issues and priorities are defined by line Mgmt. upfront, and used to determine level of information required starting now.				

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
II		<u>Forces:</u>	Lack of site specific land use allocations.			
		<u>Objective Statement:</u>	Require every MFP step 1&2 recommendation to make specific land use allocations. To be accomplished on all future plans and updates.			

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:	Includes	Synthesis
		<div> <div><u>Action Word</u></div> <div>"Do This"</div> </div> <div> <div><u>Key Result Desired</u></div> <div>"To Get This"</div> </div> <div> <div><u>Target Date</u></div> <div>"By This Time"</div> </div>		
III		<p><u>Force:</u></p> <p>Quality standards are not understood or adequately costed out prior to implementation.</p> <p><u>Objective Statement:</u></p> <p>To establish a clear understanding of the application of quality standards prior to beginning any update or planning modification. Cost analysis shall be done prior to Director's sign off on standards.</p>		

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
IV		<p><u>Force:</u></p> <p>Lack of flexibility to relate planning system to District needs. Doing planning to satisfy the system not needs.</p> <p><u>Objective Statement:</u></p> <p>After issues and problems are identified at District level, adapt system to meet these issues, keep planning regulations adaptable.</p>				

Summary

Priority Forces and Objective Statements

Priority	Force No.	Objective Statements Include:			Includes	Synthesis
		<u>Action Word</u> "Do This"	<u>Key Result Desired</u> "To Get This"	<u>Target Date</u> "By This Time"		
V		<u>Force:</u> (additional without objectives defined) Inflated and unrealistic expectations of the planning system both in-house and externally.				
VI		Lack of timely and adequate update of BPS documents.				
VII		Lack of system to measure results.				
VIII		System not designed to accomodate changing priorities and new demands.				

ACTION PLANS

The following section reports the completed staff work generated by the Action Planning Teams.

These teams were developed from the work of the "consensus team" whose task was to synthesize the work products of the force field teams. The consensus team identified the most frequently reported priority forces and developed action team membership on the basis of participant expertise and experience, as well as on other factors.

The task of the Action Teams was to develop a step-wise change procedure for dealing with identified problem areas.

SYNTHESIS ACTIVITY FINDINGS *

Synthesis:

References:

Action Items

Work Group Priority Recommendations

1. Pre-planning Analysis
 - Quality Standards
2. Training
3. Utilization
 - Implementation Schedule
4. Management Direction
 - Accountability/Roles
5. Public Participation

A	B	C	D
A ₁		C ₄	D _{1,4}
		C ₃	D ₃
A _{2,3}	B ₁		D ₂
A ₄			
	B ₄	C _{1,2}	

State Director

* The alpha-numeric reference system indicates the priority recommendations of the Force Field Work Teams. The matrix represents a synthesis of the team work products, thus, Synthesis Action Team 1 was Force Field Team A's first priority item, thus, Synthesis Action Team 1 was Force Field Team A's first priority item, Team C's fourth priority item, and Team D's first and fourth priority items.

ACTION PLAN TEAMS - ASSIGNMENTS

ACTION PLAN TEAMS

Group 1 - Pre-Planning Analysis/Quality Standards

Stan Butzer *
Mark Morse
Bob Metzger
Buz Kennedy
Tom Rodda

Group 2 - Training

Lou Boll *
Bob Barney
Steve Howard
Joel Verner
Bill Rus

Group 3 - Utilization/Implementation Schedule

Al Thompson *
Jerry Everts
Rich Learned
Ed Lynch
Neil Pfulb

Group 4 - Management Direction/Accountability/Roles

Gerry Hillier *
Marc Duncan
John Birch
Terry Woosley

Group 5 - Public Participation

Rex Cleary *
Jerry Harrell
Dave Mari
Martin Prisco
Roy Pearl

* Team Leader

OBJECTIVE STATEMENTS

&

ACTION PLANS

PRE PLANNING ANALYSIS

Objective:

Establish a pre planning analysis system which will provide a firm contract, between S.O. and D.M. Staff specialist for the Director and for the District to meet and support decisions required. The pre planning analysis on Land allocation Issues will include in sequential order the following:

1. Identification of issues
Ex. Conflict areas, critical areas, etc., (Involvement by other states, Federal and Private organizations)
2. Present situation
Ex. Planning, data, manpower, skills, public, etc.
3. Level of decision expected
Ex. Activity plan level, regional, zone, etc.
4. Level and kind of data
level = Degree and intensity
kind = Specific resource
(Standards)
5. Level of public involvement
Number and kind (procedure)
6. Schedule:
 - a. Work months
 - b. Skill mix
 - c. Funding
 - d. Timeframe (multi-year)
 - e. Accountability (by individual and component)
7. Problems and recommendations
 - a. Lack of base skill
 - b. Lack of data
 - c. Confidence level (risk)
 - d. Public attitude (conflict)
 - e. Priorities in relation to other areas
 - f. Etc.

Target Date: 1/19/79

OBJECTIVE (WHAT): PPA

ACTION PLAN

Team 1

MEASUREMENTS (WHAT): _____

APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): 1/19/79

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
1. Assign Lead (issue interim guidance) based on concepts.	SD	--	--	10/27/78	11/1/78	Place responsibility	
2. Name task force and obtain Approval (management, planning, specialist, SO, DO Area)	Lead			11/3/78	11/3/78	" "	
3. Develop work plan and obtain approval	Lead			11/6/78	11/17/78	Management commitment	
4. Develop draft S.O. supplement (to include evaluation and follow-up)	task force			11/27/78	12/1/78	Document	
5. Brief S.D.	task Force			12/1/78	12/1/78	Management Direction	
6. Field review (non consolidated review)	supv. level			12/8/78	12/22/78	Comments	
7. Revise draft, prepare final	task force			1/8/79	1/12/79	Document	
8. Brief S.D. and obtain approval	task force			1/12/79	1/12/79	Management Commitment	
9. Issue S.O. supplement	S.D.			1/15/79	1/19/79	Solution of long term planning problem	

TRAINING

Objective:

- A. To provide individual BLM employees, and selected public with an understanding of the process (the who's, what's and where), benefits and purposes of planning, and;
- B. To give those specialists and managers involved in the execution of the planning process an understanding of the "how to" of specific components of the BPS with emphasis on:

- Conflict Resolution
- Pre planning Analysis
- Site specific Resource Allocations

Measuring Effectiveness:

- 1. Attitude toward planning - BLM and Public
- 2. Product usability
 - a. in budget requests
 - b. in land use decisions
 - c. support for EARs/ES

Assumptions:

- 1. There is presently enough material, program etc., in BLM now to adequately explain the process of planning.
- 2. Specific system component training will be oriented toward California

Strategy:

Three district training modules oriented toward:

- 1. General orientation and understanding
 - a. Target- Public groups, non involved BLM employees (clerks, etc.) and new employees.
- 2. Comprehensive total system overview
 - a. Target - all involved BLM employees
select public groups
advisory boards
- 3. Specific case study
 - a. Involved specialists and management

Flexibility:

The training modules are to be developed so that they can be adapted for various groups and time schedules.

OBJECTIVE (WHAT): Training

Team 2

ACTION PLAN

MEASUREMENTS (WHAT): Attitude - Budgets, decisions, EAR/EIS

APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): _____

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
1. Form team (PECS, RES, Training Off, Districts. e.g., AM)	S.D.			ASAP	Same	Team identification	
2. Present state of art assemble	Team	80	100	12/30/8	4/79	Provide data base for action further	
-- All existing system training							
-- Examples of Planning benefits							
-- Case studies							
- Conflict resolution	Team	240	300	4/79	7/79	Good screened Training Materials	
- Site specific LU Allocations							
- PPA (team building)	Team & other	480	300	7/79	2/80		
3. Evaluate material							
4. Develop product training programs	Team & other (orientation) as ident. by team						
-- General orientation package							
-- Process, benefits, purposes (orientation)							
-- Specifics (case studies)							
Review by S.D.	S.D.	40	100	2/80	2/80		
5. Identify Test Target groups: Specialists, mgmt., public	SD & DM	5	--	2/80	2/80	Testing the training program	

OBJECTIVE (WHAT): Training (Cont'd)

Team 2

ACTION PLAN

MEASUREMENTS (WHAT): _____

APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): _____

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
6. Do it		?	?	4/80	4/80	Actual Test	
7. Evaluate results - effectiveness	trainees	?	--	4/80	4/80		
8. Refine	team or trng office	40	100	4/80	6/80	Clarify/etc.	
9. Make it available		--	--	7/80	7/80		

SYSTEM FOR UTILIZATION & MAINTENANCE OF PLANNING
DOCUMENTS

Objective:

1. Management notes whether staff has included a consistency statement in their decision documents i.e., land reports, mineral reports, EAR's, etc., and whether the action is consistent or inconsistent with MFP decisions.
2. How and where these statements will be filed.
3. Work out details with P.C. on how these statements will be integrated into a District plan utilization summary at Mid Year and End of FY and how the summary map will be developed.
4. Employee orientation and followup should be covered by District Instruction Memo.

OBJECTIVE (WHAT): System for Utilization & Maintenance of
planning documents

ACTION PLAN

MEASUREMENTS (WHAT): _____

APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): _____

APPROXIMATE COSTS _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
Document decision consistency with MFP Decisions	AM, DM	--	--	Now	continuous	Develop a habit of document use.	
Accumulate official actions in an MFP file	clerk	--	--	Now	continuous	Convenience for summary review	
Insure that Area Staff's actions are consistent with planning documents by insuring that all decision documents contain consistency statement.	AM	--	--	Now	continuous	Staff references planning documents when making recommendations to AM.	
District plan utilization summary at M.Y. review to consolidate & summarize all consistency statements pulled from MFP file	P.C	8	--	FY 79	continuous	Provides DM with overview of MFP utilization & shows possible needs for change.	
Develop map showing actions in consistent with MFP's, Districtwide, (copies to State Office)	P.C.	8	--	FY 79	continuous	Go above plus more graphic.	
Orient all new employees on data & system documents; annual follow-up work shops as needed.	DM, AM, PC		--	Now	continuous	Maintain familiarity & use of planning documents & surfaces attitudinal problems.	

OBJECTIVE (WHAT): (cont'd)

MEASUREMENTS (WHAT):

COMPLETION DATE (WHEN):

ACTION PLAN 2

Team 3

APPROXIMATE MANHOURS:

APPROXIMATE COSTS

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
Interview employees who use the system	DM, AM PC		--	FY 79	Periodic	Surface attitudinal problems towards BPS & I.D.s weakness in system.	
78 AMs and DMs should frequently ask employees if they use the planning documents in arriving at their recommendations.	AM, DM		--	FY 79	Periodic	Dito above	
Train staff in the use of planning documents	AM, DM PC		--	FY 79		insure use of documents.	
Keep MFP documents and overlays visible in working area		--	--	FY 79		stimulate use.	
Assign specific tasks for system maintenance	DM, AM	--	--	FY 79		Maintain planning documents & stimulate use	Establish Maintenance System
Develop a generalized Districtwide system for maintenance (sample attached)	PC	40	--	FY 79		Maintain & insure up date of district planning documents.	

OBJECTIVE (WHAT): EXAMPLE

MEASUREMENTS (WHAT):

COMPLETION DATE (WHEN):

Team 3

ACTION PLAN

APPROXIMATE MANHOURS:

APPROXIMATE COSTS

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
EXAMPLE Change in MFP -- DM prepares a Map and narrative describing a proposed change in MFP including the reasons for change. -- Submit to S.O. -- If no response in 30 days assume no objections -- Public notice in local newspaper with 30 days for Response. -- Decision by DM -- Change official MFP Maps and documents							

Objective:

Planning priorities and accountability will be established statewide on a multi-year basis (5 years).

Steps:

- Role Clarification
- Organization (placement, staff size, etc.)
- Position Descriptions
- POGs
- PPA
- AWP
- PIPR

OBJECTIVE (WHAT): Mgmt. Direction/Accountability/Roles

Team 4

ACTION PLAN

MEASUREMENTS (WHAT): _____

APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): _____

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
Role Clarification and Organization							
1. a. DM's and staff develop recommendations for their districts or how they will function internally and interface with SO.	each DM w/AM Chf.Res Chf.Pc DPS			11/78		Establish accountability. Clarify roles internally	
b. SD and Staff develop recommendations	SD w/ staff			11/78		" "	
2. SD/ASD/DM brainstorm	SD, DMS			1/79	Jan.DM meeting end of div. meet	Establish interface between DMS, State office staff & OPS	
3. Formalize decision by SD establishing relationship among SO,DO,OPS Establish contracts (maybe different contracts)	SD, DMS						
Position Descriptions Based on #1 & 3 in Roles, DMS incorporate BPS items in appropriate PD's	each supv Dist/ SO			2/79	4/79	Formalize roles	

OBJECTIVE (WHAT): Team 4 (cont'd)

MEASUREMENTS (WHAT): _____

COMPLETION DATE (WHEN): _____

ACTION PLAN

APPROXIMATE MANHOURS: _____

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
Program Packages Set priorities at December DM meetings	SD w/ PECS			11/78	2/30/79	Assure not BPS requirements are in DO pkgs.	
Through out process, PECS assure DM's include planning & plan implementation for District plan.						Assure existing plans get at least considered for implementation. Set priority for planning against all other operational work.	
P.O.G.'s SO specialists develop	SO			10/78	12/78	Set planning direction	
Address BPS priorities - for all programs & funding outlooks	Spec.					Give fixed into on planning & find outlook.	
Pre Planning Analysis/AWP 1. Complete for all FY 79,80, &81 MFP/ES efforts by June 1979	Dist.			Now	6/79	Identify manpower & budget needs. Set parameters for inventories & planning detail Identify issues which specific plans will address	
2. SO spec. address PPA requirements in AWP directives by allocation of NMs and \$s							

OBJECTIVE (WHAT): Team 4 (cont'd)

MEASUREMENTS (WHAT): _____

COMPLETION DATE (WHEN): _____

3

ACTION PLAN

APPROXIMATE MANHOURS: _____

APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
<p>AWP</p> <p>SD array overall state priorities among programs and activities</p> <p>1. DM's develop priorities for their districts. Submit W/80 AWP</p> <p>2. DM meeting (Aug. Sept) - sharing debate, etc.</p> <p>3. SD decision</p>	DMs & Staff			6/79	7/79	A contract between SD and DM's. Clear understanding by all staff & line mgmt. of statewide priorities including BPS	
<p>PIPR</p> <p>Based upon role clarification/organization PPA, & AWP develop specific PIPR items</p> <p>1. First run - in dev. of FY 79 PIPRs</p> <p>2. Refine FY 79 after PD rewrites (if any)</p> <p>3. Formalize roles & specific accountability based on prev. years discussions for FY 80</p> <p>Contracts - SD Staff SD DM</p>	State Director			8/79	8/79	A contract for AWP commitments.	
	All supv.			10/78	10/80	Contracts role clarification specific accountability in conformance w/DP's and AWP	

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PUBLIC PARTICIPATION

Objective:

To involve the public in making land use decisions and to provide the public and BLM with the means to identify issues, determine inventory processes, identify alternatives, and select solutions with respect to the present and future management and use of the public lands-without resorting to the judicial system for conflict resolution.

Key Concepts

If the public meetings are used they should be used only to increase public understanding rather than for input.

Involve Cross section of Public in:

- A. Pre-plan analysis
 - 1. issues
 - 2. Inventory processes
 - 3. Public participation plan
- B. Participating somewhere between MFP-1 and ES Draft
 - 1. Identify alternatives
- C. Participating somewhere between ES draft and Decisions
 - 1. Select blend of alternatives solutions for decisions
- D. Feedback decisions to public in manner that explains how public views were used.

Utilize mediation and Negotiation Technique to Achieve Agreement before resorting to courts.

OBJECTIVE (WHAT): Training in Citizen Participation Techniques
ACTION PLAN

Team 5

MEASUREMENTS (WHAT): _____ APPROXIMATE MANHOURS: _____

COMPLETION DATE (WHEN): _____ APPROXIMATE COSTS: _____

Work Steps (How)	Who Does It	Approx Costs		Begin When	Finish When	Expected Results - What Will This Step Do?	Actual Results - What Did It Do?
		Man-Hours	Travel Costs				
Training: -Workshop or Seminar in Citizen involvement techniques.	Consultant				1/1/80	understanding on part of BLM persons of peoples sensitivities & expectations.	
85 -Workshop and Seminar on Mediation and Negotiation technique	"	8	0	11/78	11/78	Help managers design better solutions to human conflicts.	
1. Review ex. draft public participation manuals	PECS/PAO	4	0	11/78	11/78		
2. If adequate District to ACO's.	"	16	0	11/78	12/78		
3. If not, prepare contract to develop handbook to meet objective	"			1/78	1/78		
4. Issue contract	"			1/78	4/78		
5. Prepare draft handbook	"			4/78	5/78		
6. Review draft handbook	ACO's			6/78	6/78		
7. Submit comments to contractor	PAO			6/78	7/78		
8. Finalize handbook	PECS			8/78	8/78		
9. Distribute handbook	PAO	4	0				

ACTION TEAM PRIORITY RANKINGS

At the conclusion of the Action Planning sequence the State Director requested each Action Planning Team to review the top five priority issues and to re-prioritize in terms of which issue should be worked on first. The following section reports these findings.

ACTION TEAM PRIORITY RANKINGS - By Team

Team A

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Management Direction |
| 3rd | System Utilization |
| 4th | Public Participation |
| 5th | Training |

Team B

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Training |
| 3rd | Management Direction |
| 4th | System Utilization |
| 5th | Public Participation |

Team C

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Management Direction |
| 3rd | System Utilization |
| 4th | Training |
| 5th | Public Participation |

Team D

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Training |
| 3rd | System Utilization |
| 4th | Management Direction |
| 5th | Public Participation |

Team E

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Management Direction |
| 3rd | Public Participation |
| 4th | System Utilization |
| 5th | Training |

Action Team Priority Rankings - Consensus

- | | |
|-----|-----------------------|
| 1st | Pre Planning Analysis |
| 2nd | Management Direction |
| 3rd | System Utilization |
| 4th | Training |
| 5th | Public Participation |

BUREAU PLANNING SYSTEM
WORKSHOP QUESTIONNAIRE

The success of any workshop of this nature is dependent upon the participants. It is even more important in this instance to have input from those who have experienced this first workshop effort. Although Idaho chose to have the first BPS Quality Workshop, it also foreclosed the opportunity to learn from past efforts in other states. Your input now will be used to improve workshop procedures in order that others may also benefit from your experience in California.

The questions asked were designed to elicit information in the following areas:

- . whether the workshop was useful to the participants
- . if useful, what techniques were more helpful than others
- . whether the workshop was helpful in issue and problem identification as a basis for change
- . how future workshops can be improved
- . and, what other ways can the Service Center or State Office be helpful in attaining in attaining planning quality

BPS QUALITY WORKSHOP

Post Workshop Questionnaire

We believe you can be an important contributor toward the improvement of this effort. Please provide us with your honest feedback. Circle the number that most closely represents your perception. Some items ask for written responses.

Do not give your name, but please check whether you are a manager or staff and your management level. We hope that you will find this questionnaire interesting and thought provoking.

Manager () Staff ()

Supervisor () Non-Supervisor ()

Level: State Office ()

District Office ()

Area Office ()

1. Was the workshop helpful in opening up communications?

1	2	3	4	5
Little		Some		A Great Deal

How?

2. Was the workshop helpful in identifying issues that can increase the quality of planning documents?

1	2	3	4	5
Little		Some		A Great Deal

How?

3. Implementation of the Action Plans developed by the work teams will increase our organization effectiveness in dealing with BPS quality issues.

5	4	3	2	1
Strongly Agree		Uncertain		Strongly Disagree

4. Would you participate and support Team (intra-office work units) and/or Inter-Team (between office, State-District) Workshops in the future if needed?

Yes _____

No _____

Why?

5. List 3 factors, if any, that contributed most to your learning experience from the workshop.

a.

b.

c.

6. List 3 factors, if any, that detracted most of the workshop to your learning experience.

a.

b.

c.

7. I feel that I have a good working knowledge of the Force Field Analysis Technique.

5	4	3	2	1
Strongly		Uncertain		Strongly
Agree				Disagree

8. What are some other things the Washington Office, Service Center, State Office or Districts could do that you feel would be helpful to attain planning quality?

a.

b.

c.

9. I feel that there is more of an overall team feeling as a result of this workshop in our organization.

5	4	3	2	1
Strongly		Uncertain		Strongly
Agree				Disagree

Explain:

10. Further comments:

POST-TEST RESULTS

The results of the post-test are shown in Table 1. The results show that the majority of the participants (80%) were able to identify the correct answer to the question.

Table 1 shows the results of the post-test. The majority of the participants (80%) were able to identify the correct answer to the question. The results show that the majority of the participants (80%) were able to identify the correct answer to the question.

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POST QUESTIONNAIRE RESULTS

Table 2 shows the results of the post-test. The majority of the participants (80%) were able to identify the correct answer to the question. The results show that the majority of the participants (80%) were able to identify the correct answer to the question.

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QUESTIONNAIRE RESULTS

The overall results of the questionnaire are fairly positive. Many participants gave helpful suggestions for improvement. Also included is a graphic representation of those questions using scales.

Responses to Question #1, with a mean rating of 4.26, suggest that most participants felt that workshop very useful in opening up communication. Interchange between various disciplines and assignments within BLM was seen as a valuable activity. Communication and open communication lines between various management levels will be very important in insuring successful action plan implementation.

Question #2 identified respondents' desire to develop an understanding of the objectives of a regional plan. The mean score of 4.56 indicated that participants felt the workshop was extremely useful in identifying issues that can increase the quality of planning documents.

Question #3 deals with the extent to which participants feel that the action plans developed by the work teams will increase organization effectiveness in dealing with BPS quality issues. A mean score of 4.39 strongly suggests that workshop participants are confident that the completed action plans will resolve many problems associated with quality in planning system documents.

Responses to Question #4 were unanimous (yes 23, no 0) in support of the utilization of the workshop techniques for bringing subordinate staff into the "planning team". Participants felt that the mechanisms employed in the workshop would be productive in developing an overall "quality orientation" throughout the planning system.

Question #5 had a variety of responses. The most recurrent theme being reflection of a sharing of ideas, openness and going beyond just problem identification. All of these point to better and more free communication.

Question #6 sought responses concerned with factors that detracted from the workshop learning experience. Comments ranged from dissatisfaction with facilities to a desire for more discussion time.

Question #7 relates to participants' overall feelings of competency with the Force Field Analysis Technique. This question, in part, seeks to gain an understanding of the extent to which management might feel comfortable utilizing the workshop mechanism for training subordinate staff at the local levels. Responses to the scaled question indicate strong feelings of competency and working knowledge of the approach with the mean rating falling at 4.43.

Question #8 asked for suggestions on how Service Center, State Office and Washington Office staff could aid in attaining quality planning. All of the responses to this question are helpful to central office staff. This will help not only future workshops but requests from the field for technical assistance. A number of items indicated a desire for "good examples." Good examples of MFP 1, 2 and 3 were included in each notebook and other planning system components were on hand for reference at Anchorage. Because of the

size of the material, it was not feasible to give a full BPS example set to each participant. Please remember that a specific component or subcomponent example can be requested from DSC, D-380.

Question #9 requested participants to respond on a scale of strongly agree to strongly disagree, regarding the extent to which the workshop was helpful in developing an "overall team feeling". Responses to the item, as can be seen on the graph, suggest most participants were in positive agreement regarding the contribution of the workshop toward "team building" with the mean rating centered on 4.00.

Finally, Question #10 provided an opportunity for participants to relate further comments or suggestions. This data will be extremely useful in future planning efforts as well as the design and delivery of future workshops.

PARTICIPANT RESPONSES

1. Was the workshop helpful in opening up communications?

How?

Force Field Analysis-action output.

The teams were open and active. When reassembling in large groups, however, there inevitably is less chance to air all issues.

Allowed for free flow of dialogue around key issues identified by the groups.

Force Field Analysis.

Communications have always been good-this helped by bringing DM's, AM's, and planning coordinators together.

Cross-section of California was represented in work groups.

Team composition and format requirement to participate.

Communications were already pretty open in California.

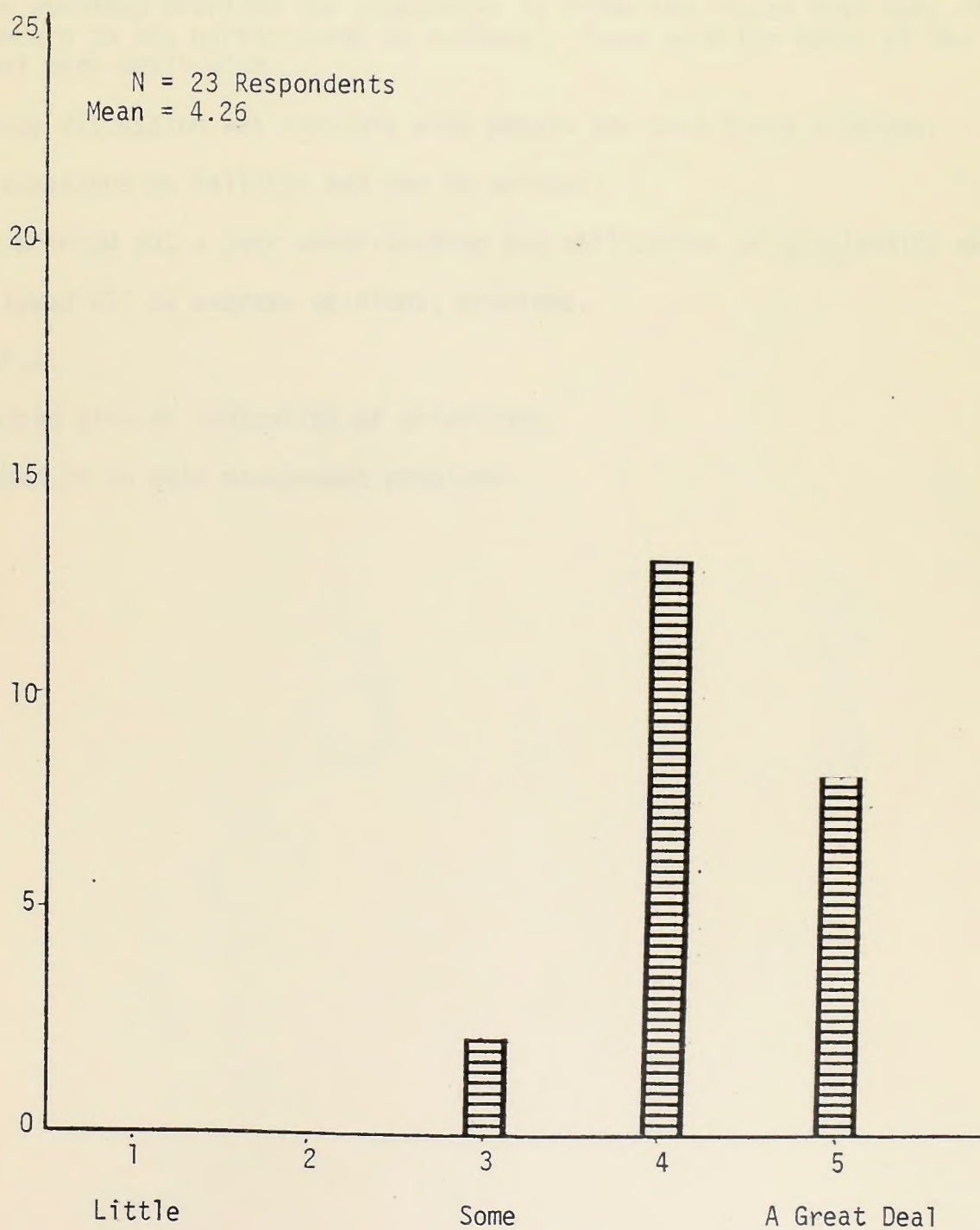
Identification of common problems and identify possible resolution.

Provided for group participation.

Communications already open in California.

1. Was the workshop helpful in opening up communications?

Number of
Responses



2. Was the workshop helpful in identifying issues that can increase the quality of planning documents?

How?

Action output.

I think all our objectives are very good.

The workshop provided the atmosphere to allow the issues that were of concern to the participants to surface. These were the basis of the issues that were dealt with.

Group discussion was possible with people who have these problems.

Discussions on failings and how to correct.

It pointed out a poor understanding and utilization of preplanning analysis.

Allowed all to express opinions, problems.

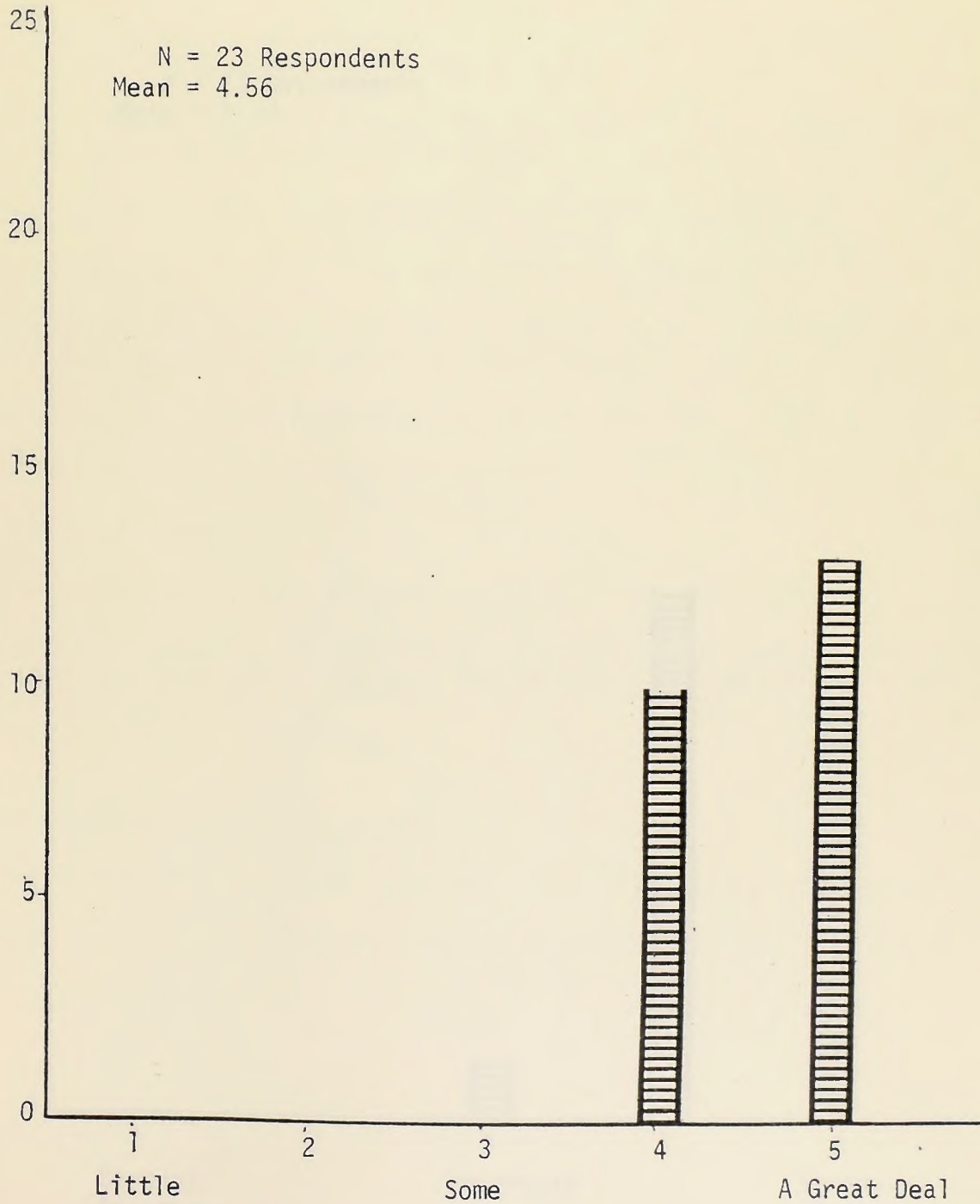
P.P.A.

Helped give an indication of priorities.

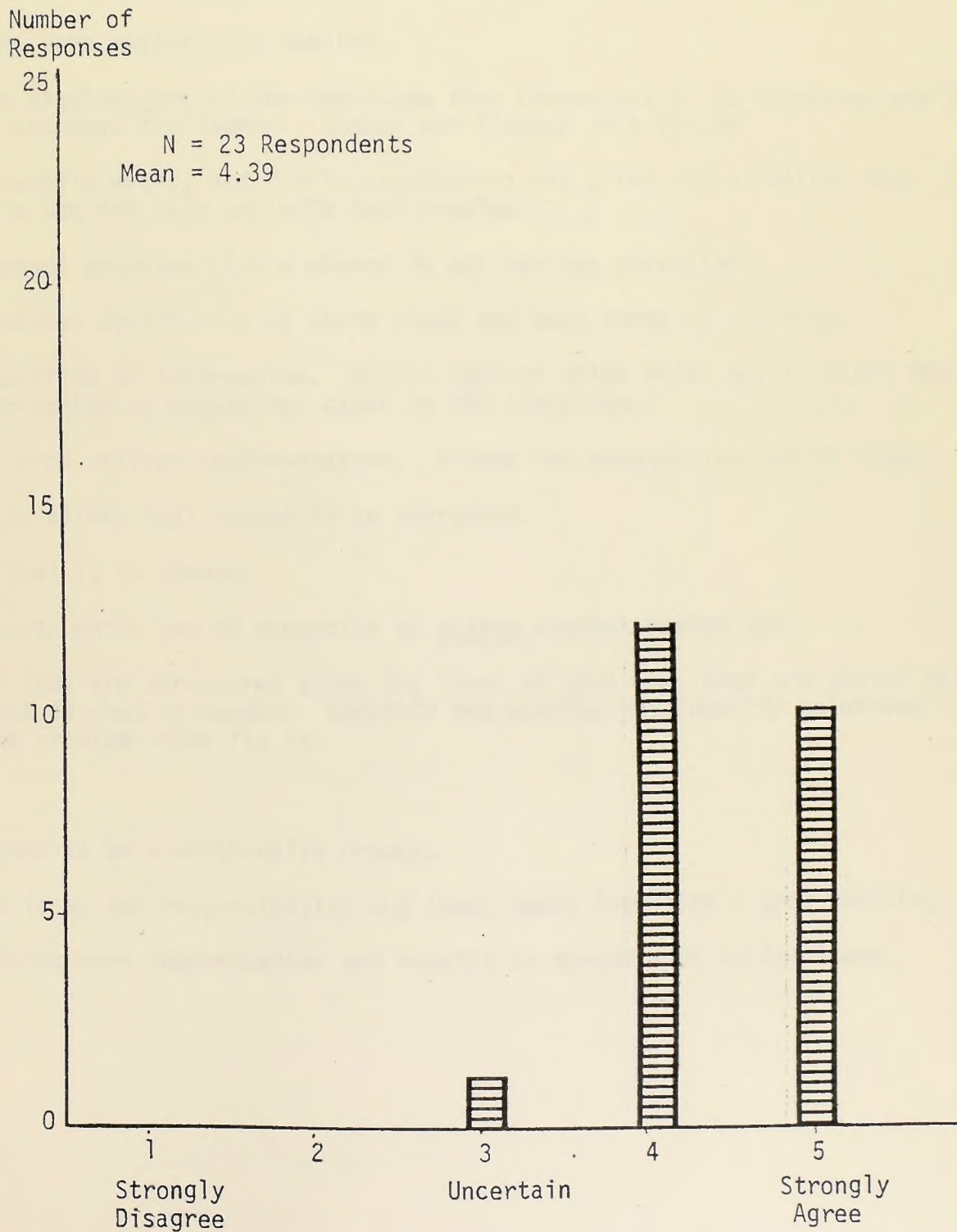
Keyed in on main management problems.

2. Was the workshop helpful in identifying issues that can increase the quality of planning documents?

Number of
Responses



3. Implementation of the Action Plans developed by the work teams will increase our organization effectiveness in dealing with BPS quality issues.



4. Would you participate and support Team (intra-office work units) and/or Inter-Team (between office, State-District) Workshops in the future if needed?

Yes 23

No 0

Why?

Focus on more specific solutions on the firing line.

They have measureable results.

The problems are of the magnitude that change has to be supported and developed up and down the ladder. Change won't occur in a vaccum.

Dispellis myths, and faulty assumptions and gives one a feeling that "I'm not the only one with that problem."

Product oriented plus a chance to set our own direction.

Provides opportunity to share views and make known my concerns.

Crossflow of information. Unbias reviews often point out problems that are overlooked by people too close to the situation.

Assures uniform implementation. Allows for greater sharing of ideas.

This allows real issues to be addressed.

I feel it is needed.

Constructive use of expertise to change present system use.

If they are structured along the lines of this one, they are action oriented. That is what is needed. Identify the problem and identify solutions to fix the problem--then fix it.

Seems to be a worth-while process.

It is my job responsibility and these teams look like a good vehicle.

Allows open communication and results in agreed upon action items.

Group participation.

Learning by doing.

Discussions were positive.

Input from field managers.

Direct discussions with the state director.

Panels lead by management.

Better overall views of states concerned.

Useful tools to apply immediately.

A renewed "fired up" desire to make the system work.

Working directly with division of resources counterpart with a district manager for motorator.

The cross section of viewpoints given.

The heavy involvement of the state director and hearing his views firsthand with feedback.

Interest of state director.

Task requirements laid out prior to meeting.

Viewpoints from others.

Information from field level-particularly A.M.

Better understanding of overall system issues.

Interface with other field levels.

Free discussion of ideas.

Good mix of prospectives.

Identification of problems.

Opportunity to voice my opinions and get immediate feedback.

Level of management involved in meeting (S.O., D.M., A.M., P.C.'s).

Structure of workshop.

Force Field Analysis procedure.

Small group process.

Commitment to action items.

5. List three factors, if any, that contributed most to your learning experience from the workshop.

Force Field Analysis.

Action output.

Well orchestrated.

Force Field Analysis.

Discussion of public participation.

Discussion of inventory standards.

Group interaction.

The awareness that others see or perceive common problems with issues that I, as an individual, have been concerned with for some time.

Group action toward solution of the problems identified.

Makeup of the group.

Willingness of the group to participate.

Personal interest in the topic.

Cross-communication of district, area, state office and staff.

Orientation to action plans.

Clarification of planning documents and terminology plus beneficial adaptations.

Open atmosphere for discussion.

Participation by several organizational levels.

Participant makeup.

Involvement throughout the workshop.

Working toward an accomplishment.

Small group discussions.

Free flow of ideas and no holding back.

State Director being present, giving feedback and commitment.

State office, district office and area office involvement.

Conflict identification.

Action plans.

Communication.

No real push on time.

Did not try to cover all.

Surfaced problems.

Prioritize problems.

Develop action plans.

Openness.

Good time allocation.

Structure-action oriented.

People at the meeting-.

Facilitators.

6. List three factors, if any, that detracted most of the workshop to your learning experience.

None.

The location of work groups and the length of some work sessions.

My intermittent role of gopher due to some management services contractor glitches.

Nothing else much.

Noise from adjacent room.

Not quite enough time last day to finish.

Space arrangements-table in main room too small for group it accommodates.

Long hours-this is an intensive process.

Some discussions of specific problems applicable to only a few.

Facilities were not the best.

Too many individual problems not germane to the issue.

Jets.

None.

Covered some familiar ground.

Could be shortened by one half day.

Discussions digressed.

Some individuals appeared to want a decision by acclamation.

Narrow approaches by individuals.

Time constraints-could have done more. Developed some ideas for solutions.

Cannot identify any.

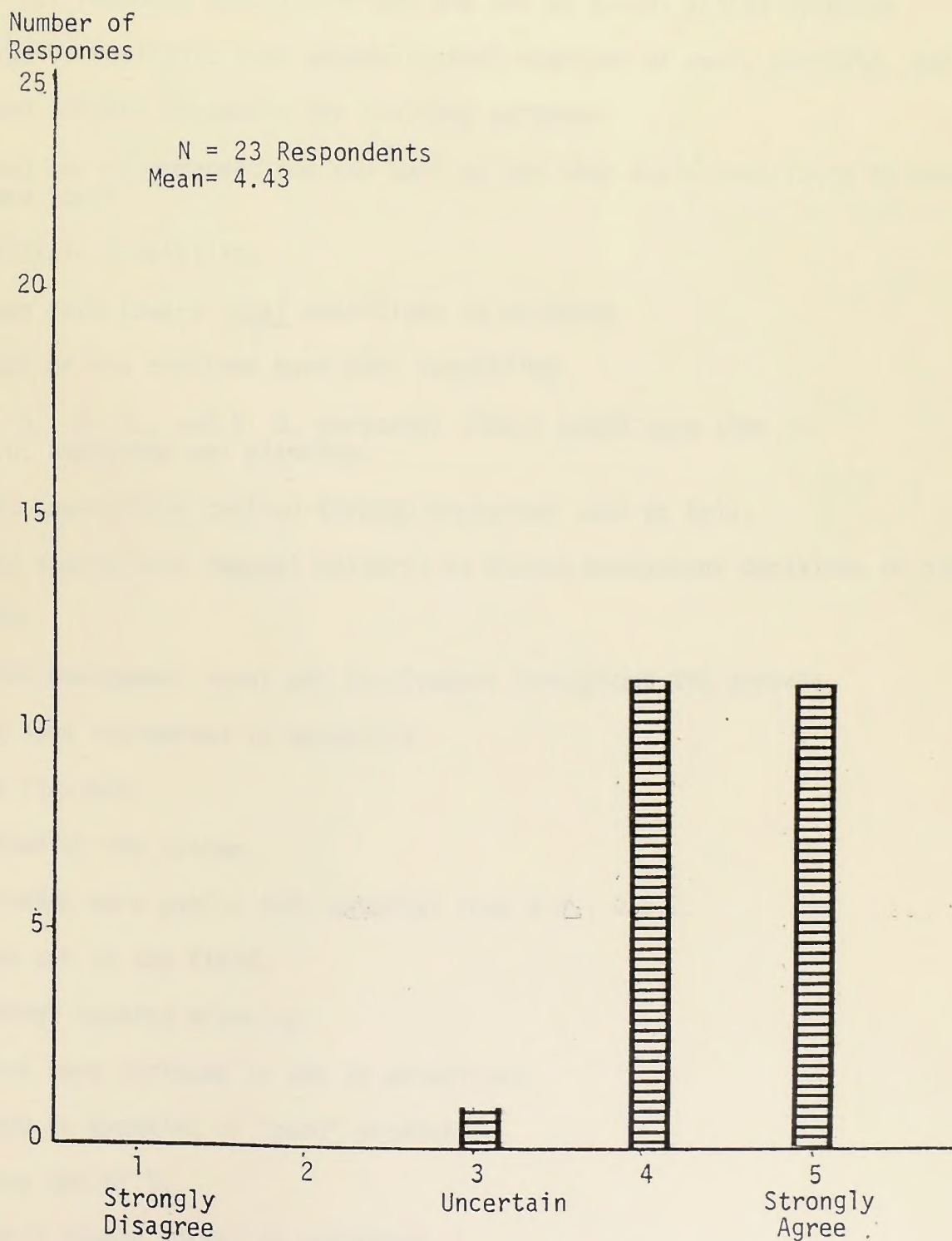
None.

The beautiful women outside our window.

Lingering feeling that lip service will be given to doing quality planning, but that too many other "priorities" will preclude it.

None.

7. I feel that I have a good working knowledge of the Force Field Analysis Technique.



8. What are some of the things the Washington Office, Service Center, State Office or Districts could do that you feel would be helpful to attain planning quality.

Substitute similarly orchestrated management improvement workshop for district GME's.

Select managers/etc. who are committed to BPS.

Select resource specialists who are not so tunnel vision oriented.

Develop realistic (but uncomplicated) examples of poor, adequate, and good URA/MFP documents for training purposes.

Read our recommendations and tell us how they could contribute to bringing them about.

Maintain flexibility.

Lean hard toward local conditions in planning.

Most of the problems have been identified.

W. O., S. C., and S. O. personnel should spend more time in D.O. assisting and planning.

Get specialists trained-through workshops such as this.

Get specialists (manual writers) to accept management decisions on standards.
PPA.

Good management input and involvement throughout the process.

Be less regimented in mechanics.

Be flexible.

Simplify the system.

Provide more public info material from W.O., D.S.C.

Get out to the field.

Review ongoing planning.

Most have surfaced in the 32 priorities.

Send us examples of "good" products.

Keep out of it.

Don't change horses in midstream.

Listen.

Use workshops like this to develop standards.

Denver Service Center should be responsible for doing general surveys addressing public attitudes to public management at the national and regional level.

Should have similar D.O. workshops as follow-up.

Support.

Reasonable directives.

W.O. more attention to system by activity division.

Somehow, gotta get this process into the district staffs and state office specialist groups.

Discuss action items back home at all levels.

Make sure action items are done.

9. I feel that there is more of an overall team feeling as a result of this workshop in our organization.

Explain:

Team concepts have been improving more in California still can be expanded.

Common problems shared and communicated working together instead of talking up and down.

Better understanding of mutual concerns and successes.

Problems are common to all districts. I am not alone!

The test is to see if we do anything as a team.

Support is developed through active participation.

State and district planners, managers and staff specialists can work together.

We all at least agree on conceptual approach to resolving common problems.

We are all committed who were here. I don't know yet if my staff is.

Mutual understanding and clarification of problem areas.

Major concerns surfaced from several areas, leading to unified approach to solving the problems.

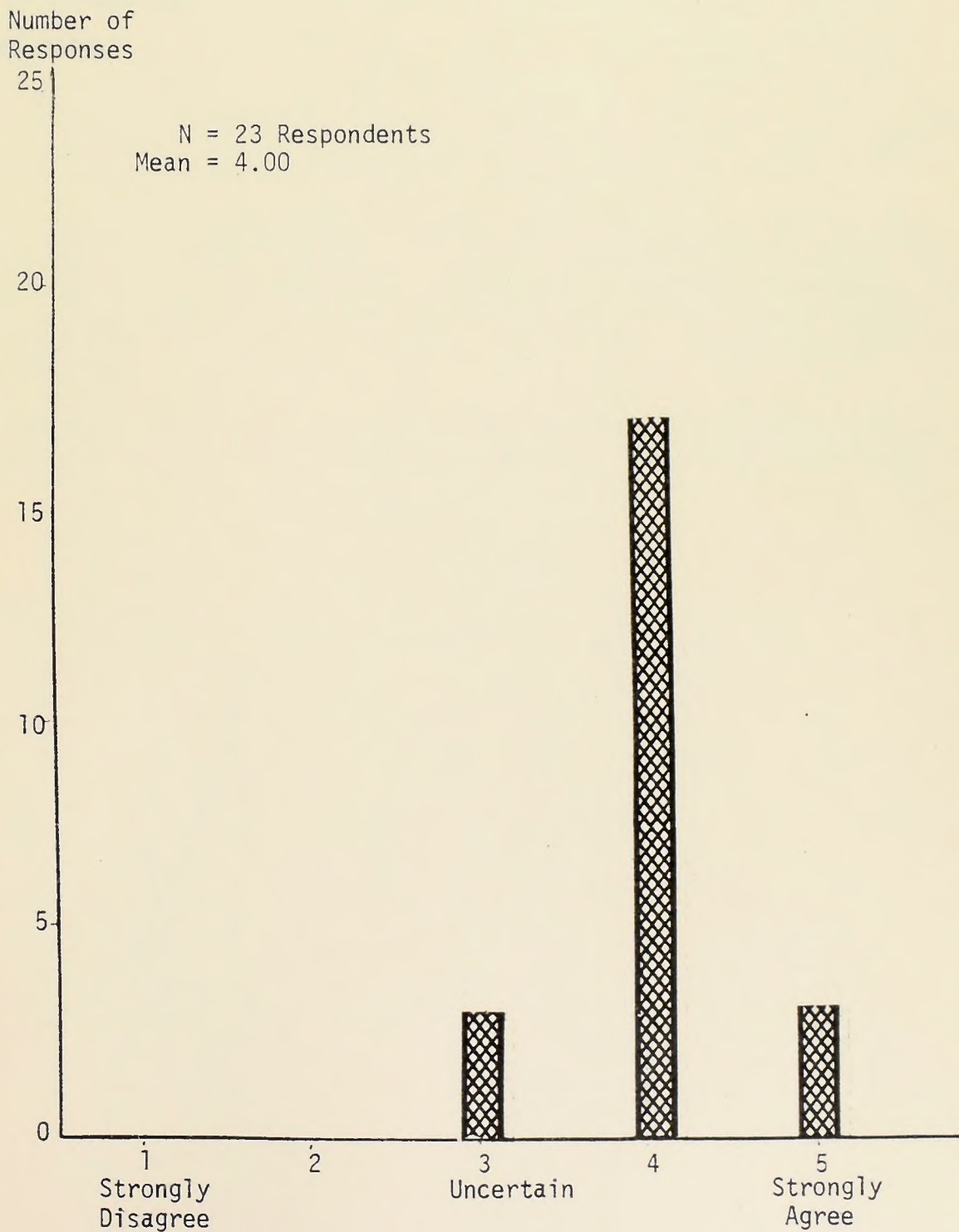
S.D., S.O., D.O., A.M. commitments to what was laid out.

We found out we all seem to be experiencing the same problems.

There were always differences in problems/approaches, etc., between offices that cannot be fully understood by other offices.

Already had overall team feeling.

9. I feel that there is more of an overall team feeling as a result of this workshop in our organization.



10. Further comments:

We need a lot more emphasis on this action/solution oriented approach to problem solving in the Bureau and less emphasis on manuals and conventional evaluations.

We are going in the right direction.

Jeff is one hell of a facilitator, he kept the workshop moving- and on track without running it.

Good show.

SUMMARY

The BPS Quality Workshop held in California identified a variety of issues hampering the management of the planning process. This report reviews those issues and reports the sequence of actions chosen to overcome the specific problems.

The leadership exhibited by the State Office, as well as an overall statewide commitment to follow through on suggested programs for change, indicates a strong desire to "fine-tune" the planning system to the specific needs of California for quality planning. The particular targets for change identified by California focus on pre-planning analysis, training, system utilization, management direction and public participation. The successful management of change on these issues should help move California toward its goal of informed decision-making in the planning process.

The Bureau in California is charged with a variety of complex planning tasks. The various public and special interest groups advocate planning decisions not always consistent with a multiple-use orientation. California initiates creative and innovative solutions amid a turmoil of politics, legal aspects, increasing resource demands and ever growing population pressures.

Hopefully, with committed follow-through, California will continue to set examples in highly perceptive and rationally functional land use planning.

